



# **CIMS 4.0**

## **Final Release Notes**

<b>Overview</b>	<b>2</b>
<b>System Wide Changes</b>	<b>5</b>
<b>CIMS CENTRAL</b>	<b>6</b>
Introduction	6
Logging on to CIMS Central	6
Moving between Applications	7
<b>CLIENT SERVICES</b>	<b>8</b>
<b>Income Documentation Tab</b>	<b>8</b>
Income Information	9
Documentation of Proofs	12
Previous Income for the Group	13
Determining Income Eligibility	13
Income Averaging	14
Adjunct Eligibility	15
Migrant Income Determination	16
Pre-Screen Wizard	17
New Certification Wizard	17
PE and EN Wizards	18
CC Wizard	18
Change Cert Info	19
Income History	19
<b>New Nutrition Risk Factors</b>	<b>20</b>
Autocalculated Risks	21
<b>Assess Risk Tab</b>	<b>22</b>
<b>Graphs</b>	<b>22</b>
Viewing Graphs on Screen	24
<b>Registered Dietitian Wizard</b>	<b>24</b>
<b>Client Reports</b>	<b>25</b>
<b>Check Changes</b>	<b>27</b>
<b>Complaints Against Retailers</b>	<b>28</b>
<b>Void/Replace Wizard</b>	<b>28</b>
<b>Replace Non-CIMS Check Wizard</b>	<b>29</b>
<b>CLINIC REPORTS</b>	<b>30</b>
Introduction	30
Clinic Reports	30
Participation Reports	31
Client Characteristic Reports	31
Nutrition Risk Factor Reports	31
<b>OTHER</b>	<b>32</b>
<b>Help</b>	<b>32</b>

## **Overview**

### **System Wide Changes**

- Food Stamps is now called Basic Food Program.

### **CIMS Central**

- There is a new icon on the desktop.
- CIMS has been split into Client Services and Clinic Reports.
- Once logged on to CIMS Central, the user can access both Client Services and Clinic Reports without logging on again.
- The User ID defaults to the last person logged on the workstation.
- Only one version of CIMS 4.0 can run at a time.

### **Client Services**

#### ***Income Documentation Tab***

- The tab was fully re-designed to incorporate documentation for proof of income, ID, residency and pregnancy.
- Adjunct income eligibility was moved to a separate pop-up window.
- Income averaging was made easier to use.
- The income tables can be viewed with the click of a button.
- Income can be re-assessed any time during a certification period.
- Income entered in a prescreen wizard doesn't have to be reentered for certification.

#### ***New and Revised Nutrition Risk Factors***

- All categories have some changes in risk factors based on height and weight measurements.
- Growth risk factors for infants and children are now based on the Revised 2000 CDC Growth Charts.
- Weight risks for women are now based on Body Mass Index (BMI).
- High Risk changes (including some name clarifications) from Clinic Services Redesign work have been included. Refer to Nutrition Risk Factor Summary lists.

#### ***Autocalculated Risks***

- New growth and weight risks are auto-calculated.
- Auto-calculation of risks was extensively tested and is working correctly.

## ***Graphs***

- The Revised 2000 CDC graphs are used for infants and children.
- There are now graphs for BMI/Age for children, 2 – 20 years of age and a combined view of Height /Age and Weight for Age for children 2-5 years of age.
- The graphs have been cleaned up and are easier to read.
- Users can quickly zoom in and out on graphs.

## ***Assess Risk Tab***

- New and revised risks were added. Old risks were removed.

## ***Registered Dietitian Wizard***

- Fixed bug in the Notes section for Health Concerns and Nutrition Concerns.
- The Objective tab was reformatted for easy reading and to include BMI information.

## ***Client Report Changes***

- Certification Encounter, Certification History, Measurement History, and HRCP Report layouts were changed to include BMI.
- Anthropometric and Hematological data was put into table format for easier reading and to shorten the reports.
- HRCP report now displays all measures taken during certification period.

## ***Check Changes***

- A B199 check cannot be issued in same month as a B100 series food package.
- Once a B199 check has been issued, another B199 cannot be accidentally issued.
- The wording of the message when the price of a food item for a specific retailer isn't in the system has been changed.
- A postpartum woman's (PP) food packages automatically changes from W102 to P102 in the month after she turns 6 weeks postpartum.
- An infant's food package defaults to C102 in the 12<sup>th</sup> month.
- Batch checks correctly print the Header and Trailer pages.

## ***Void/Replace Wizard***

- A warning message displays if the group has reported lost/stolen/destroyed checks in the last 6 months.
- Checks can be replaced for child over 5 yrs.

## ***Replace Non-CIMS Checks Wizard***

- A warning message displays if the client has valid checks for the current month.
- A reason for replacement must be selected from a drop-down menu.
- Selected reasons marked with an asterisk (\*) require a Replacement Reason Note be completed.

## ***Check History***

- The screen was re-designed to include columns for Bank Paid Date, Replace Reason, and Replacement Reason notes.
- The Source column now clearly shows the wizard used to create the check.

## **Clinic Reports**

- Clinic reports are now accessed through a separate icon.
- Reports are now grouped under four areas on the menu bar.
- Report titles were redesigned to include the WA Dept of Health logo.
- A window pops up while a report is generating.
- Client Characteristics Report was split into 6 separate reports. (They are not faster to run.)
- Nutrition Risk Factors report was split into 5 reports based on client category.
- Client Summary Report was changed to only include clients whose eligibility ended in the preceding three months.
- Inactive nutrition risk factors are clearly identified on each report.
- There are new icons for Generate and Clear on the tool bar.
- Printing can be done from the File menu.

## **Other**

- Gender is a required field.
- On line help has been removed and replaced with a simple directive to call the Help Desk.

## **System Wide Changes**

Food Stamps has been changed to Basic Food Program throughout CIMS.

One of the reasons for changing CIMS was to take advantage of the Windows XP operating system. You'll notice some slight color changes in the color schemes Microsoft uses. For easier reading, the resolution on your monitor should be set to 800 X 600. If you have a bigger monitor, you can increase the resolution to the next bigger size. Call the Help Desk for assistance.

You'll also notice changes in the amount of information displayed on your monitor screen. For example, the Appointment Book tab now has room to display 7 columns of staff names and 5 hours of clinic time.

# CIMS CENTRAL

## Introduction

Client Services has been divided into two separate program applications.

- Client Services
- Clinic Reports

Note: The Clinic Reports Update application and icon has been removed.

The benefits of this separation include no interference with Client Services while reports are generated, faster report generation, and enhanced technical support. You can access both of these applications by logging on to CIMS Central.

## Logging on to CIMS Central

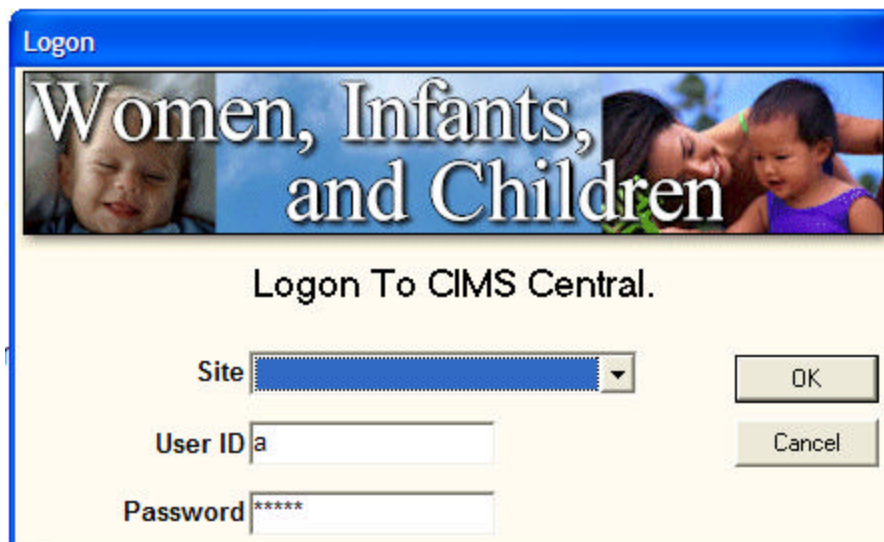
1. Click on the CIMS Central



icon.

**CIMS Central**

2. Select the site. If your clinic has only one site, CIMS automatically defaults to that site. If your clinic has more than one site, select the correct site.
3. Enter your User ID and Password. Each time you log on, the User ID of the last person logged on the computer will show in this field.



4. Click [OK] or press <Enter> on your keyboard. CIMS Central opens with the two application icons as shown.



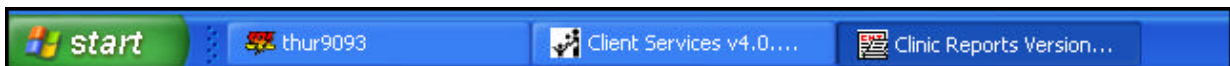
**Client Services** – This is the CIMS application you use to provide client services.

**Clinic Reports** – The Clinic and Participation reports that used to be found in Client Services are now located in this application.

### Moving between Applications

You do not have to close one application to open another. Splitting CIMS into separate applications allows you to run both Clinic Reports and Client Services at the same time. Opening a different CIMS application is easy.

- If the application is open, its icon is visible on the task bar at the bottom of the screen. Click on the icon and the application opens. No additional logon is needed.



- If the application is not currently open, click on the CIMS Central button on the task bar. When CIMS Central opens, double click on application you want to use. The application opens and its icon appears on the task bar.

# CLIENT SERVICES

## Income Documentation Tab

The most noticeable change in Client Services 4.0 is the new Income Documentation Tab. This tab was designed to meet the needs for:

- Documenting verification of
  - Income qualification
  - ID
  - Residency
  - Pregnancy
- Viewing the income history
- Modifying income mid-certification

The Income Documentation Tab remains in all wizards as before. It has been added to the Complete Certification (CC) and Change Cert Info wizards.

The screenshot displays the 'Income Documentation' tab in a software application. At the top, there are several tabs: 'Income Documentation', 'RC', 'Measures', 'Assess Risk', 'Topics', 'Handouts', 'Referrals', 'Basic Contact', 'Notes', and 'Finish'. Below the tabs, there are input fields for 'Number in Household' (set to 4), 'Medicaid' (checked), 'TANF' (unchecked), 'Basic Food Program' (unchecked), 'FDP/R' (unchecked), and 'Migrant Worker' (unchecked). A table with columns 'Cert Date', 'Assessed', 'Source', 'Proof', 'On File', 'Amount', 'Interval', 'Monthly', and 'Comments' shows a single entry for 3/26/2003 with a monthly amount of \$2,150.00. Below the table are buttons for 'New', 'Delete', 'Income Table', 'Inc Avg', and 'Adj Elig'. A 'Total Monthly Income' field shows 2150.00. On the left, there are sections for 'Proof of ID:', 'Proof of Residency:', and 'Proof of Pregnancy:', each with a list of items and arrows for selection. On the right, a 'Previous Income For Group' section shows client information: 'Abbott, Nolan C', 'Number in Household: 4', 'Income: 1940', 'Date: 10/22/2002', and 'Migrant Income Det Date'. At the bottom right, there are buttons for 'Calculate Income Eligibility' and 'Begin Cert'.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
3/26/2003	3/26/2003	Employment	Paycheck receipt/Milita		\$2,150.00	Monthly	\$2,150.00	

The Income Documentation screen can be divided into 3 main areas:

- Income information
- Proof of ID, residency, and pregnancy
- Previous income for group

## Income Information

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments	Entered By
3/26/2003	3/26/2003	Employment	Paycheck receipt/Miile	<input checked="" type="checkbox"/>	\$2,150.00	Monthly	\$2,150.00		Hawkins, Leslie E

New Delete Income Table Inc Avg Adj Elig Total Monthly Income: 2150.00

### Top Row

Number in Household When the Income Determination Tab is opened, the focus for the cursor is in this field. Once you enter the Number in Household you can tab across to other fields. This is a required field for determining income eligibility.

Other qualifying services Place a mark in one of these boxes when the client currently participates in one of these programs.

- Medicaid
- TANF (Temporary Assistance for Needy Families)
- Basic Food Program (food stamps)
- FDPIR (Food Distribution Program on Indian Reservations)

Note: Any box that is checked will stay checked at future recertifications until removed by clinic staff.

Migrant Worker information comes from the Demographics tab.

### Middle Section

Cert Date This date is generated automatically and cannot be changed by clinic staff.

- For a Pre-Screen, EN or PE it is the date of the activity. When the NC or CC occurs, this date will change to the date of the NC or CC.
- For a NC, RC, or CC, it is the date the wizard was completed.

Assessed This is the date when income was assessed for the certification period. It is set when the [Calculate Income Eligibility] button is pressed. The date is generated automatically and cannot be changed by clinic staff..

Source There is a drop down menu of income sources to select from. This is a required field for determining income eligibility.

- Employment
- Military
- Public Assistance
- Foster Care
- Student Financial Aid
- Child Support
- Social Security/SSI
- Unemployment
- Other
- None

Proof There is a drop down menu of proof items to select from. This is a required field for determining income eligibility.

- Medical Coupon
- Basic Food Program/Notification Letter
- TANF Award Letter
- Paycheck receipt/Military LES
- Unemployment check rcpt or notification Ltr
- Bank or account statement
- W2 form or tax return (most recent year)
- Accounting records for self-employed
- Social Security Award Letter
- Divorce Decree/Child Support Award Ltr
- Letter
- No proof Form
- Other
- Grace Period
- None

Note: For dropdown menus, you can enter the 1<sup>st</sup> letter of a menu item and it will fill the field.

On File Select this if you have kept a copy of the proof.

Amount The amount of income received is entered here. This is a required field for determining income eligibility.

Interval The time period for the Amount is selected from the drop down menu choices. This is a required field for determining income eligibility.

- Monthly
- Weekly
- Bi-Weekly (paid every other week)
- Twice Monthly (paid 2x per month)
- Hourly (CIMS calculates 40 hrs. per week)
- Quarterly (paid 1x every 3 months)
- Annually

Monthly Based on the amount and interval selected, monthly income is automatically calculated.

Comments You can enter notes about this income line in this field.

Entered By This field is normally not visible unless you scroll over to the right. The person logged onto Client Services is automatically entered into this field by the computer. Clinic staff cannot change it.

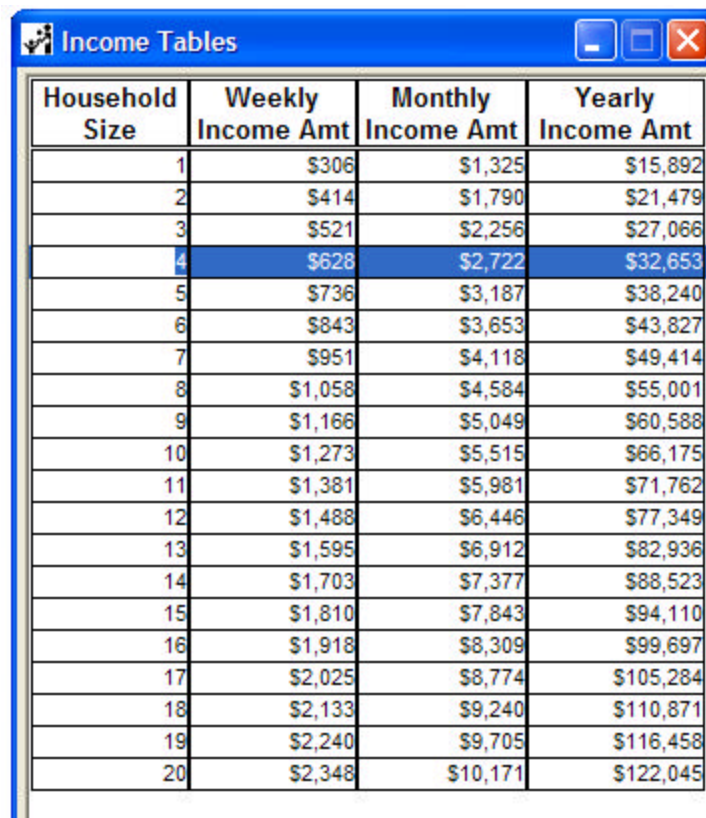
### ***Bottom Section***

There are 5 buttons and a field displaying the total monthly income.

New adds a new row for additional income information. Enter a new row for each income source.

Delete allows the user to delete an entire row of information.

Income Table allows the user to quickly view the income table to see if a client may be eligible. If the number in household is entered, the corresponding line of the income table is automatically highlighted.



Household Size	Weekly Income Amt	Monthly Income Amt	Yearly Income Amt
1	\$306	\$1,325	\$15,892
2	\$414	\$1,790	\$21,479
3	\$521	\$2,256	\$27,066
4	\$628	\$2,722	\$32,653
5	\$736	\$3,187	\$38,240
6	\$843	\$3,653	\$43,827
7	\$951	\$4,118	\$49,414
8	\$1,058	\$4,584	\$55,001
9	\$1,166	\$5,049	\$60,588
10	\$1,273	\$5,515	\$66,175
11	\$1,381	\$5,981	\$71,762
12	\$1,488	\$6,446	\$77,349
13	\$1,595	\$6,912	\$82,936
14	\$1,703	\$7,377	\$88,523
15	\$1,810	\$7,843	\$94,110
16	\$1,918	\$8,309	\$99,697
17	\$2,025	\$8,774	\$105,284
18	\$2,133	\$9,240	\$110,871
19	\$2,240	\$9,705	\$116,458
20	\$2,348	\$10,171	\$122,045

To close the window, click on the corner "X." If you prefer to use your keyboard, use [Alt] [F4] to close it. *Be careful!* [Alt][F4] is a Windows standard that closes any active window. You can accidentally close out of CIMS with no warning using this function.

Inc Avg opens the income averaging window.

Adj Elig opens the window that contains the questions to determine if a client is income eligible based on another family member's participation in Medicaid or TANF.

Total Monthly Income Income information entered on the same date is combined to calculate the total monthly income.

## Documentation of Proofs

Proof of ID:	Copies on File
State ID Card	3/26/2003 Medical Coupon
Drivers License	
Birth Certificate	

Proof of Residency:	Copies on File
State ID Card	3/26/2003 Drivers License
Medical Coupon	
Rent or Mortgage Receipt/agreement	

Proof of Pregnancy:	Copies on File
Note From Medical Provider	
Tel Verification f/Preg Testing Clinic	
Visual Recognition (Later stages only)	

'Other':

- These boxes record and maintain a history of proof of ID, residency, and pregnancy.
- The left box contains a list of types of proof to select from.
- Multiple proofs can be selected.
- If "Other" is selected as a proof, you can add notes to the 'Other' box at bottom of this section. To add a note, first highlight Other in the right side box of the proof. The bottom 'Other' field turns white and you can type your comments.
- Check the box for "Copies on file" if you keep a copy of the proof.
- Proofs for a cert period appear when the corresponding income line is selected in the Income window.

Proof of ID, Residency, or Pregnancy can be entered at any time during the certification period without reassessing income.

## Previous Income for the Group

Previous Income For Group

Client Name  
Abbott, Nolan C

Number In Household  
4

Income  
1940

Date  
10/22/2002

Migrant Income Det Date

Calculate Income Eligibility

Begin Cert

This section looks very similar to the old Income tab. A field was added to show when a Migrant group's income was last determined.

Migrant income determination is valid for one year for all members of the group.

If an income is entered as part of a Pre-Screen, PE or EN, the date the income was entered shows in this field until the NC or CC is completed. The Pre-Screen, PE and EN wizards **aren't** considered "completed" certifications. Income determination in these wizards doesn't make the migrant group income eligible.

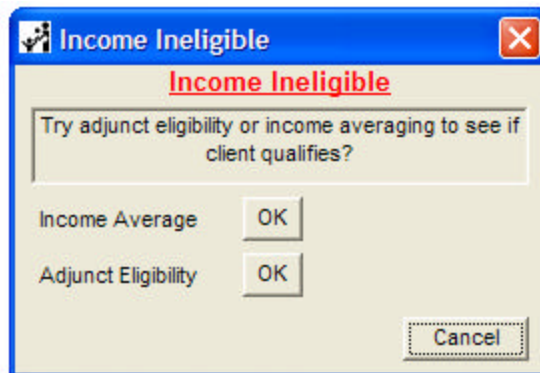
The income determination is considered complete with the CC, RC and NC wizards.

## Determining Income Eligibility

When you start a certification wizard, the Income Documentation Tab opens. A new line appears in the income section, with today's date in the Cert Date and Assessed fields.

1. Add or update the number in household.
2. Update participation in Medicaid, TANF, Basic Food Program, and FDPIR.
3. Complete the income row, selecting Source, Proof and Interval from the drop down menus. If you prefer to use your keyboard to move across the row:
  - Once you enter number in household, you can tab across to other fields.
  - You can enter the first letter of a menu item and it will automatically fill the field. (This will become easier as you become more familiar with the menu options.
  - Source, Proof, Amount, and Interval, as well as Number in Household, are required fields. You cannot complete the Calculate Income Eligibility tab until these fields are completed.
4. Type in a comment if you want to record additional income information.
5. Use the mover boxes to document the proof you saw for:
  - ID
  - Residency
  - Proof of pregnancy (if applicable)
6. If you select Other for any of the proofs, highlight Other and type what you saw in the 'Other' field at the bottom of the screen.
7. Click on the [Calculate Income Eligibility] button.

If the client is income ineligible, this message box pops up:

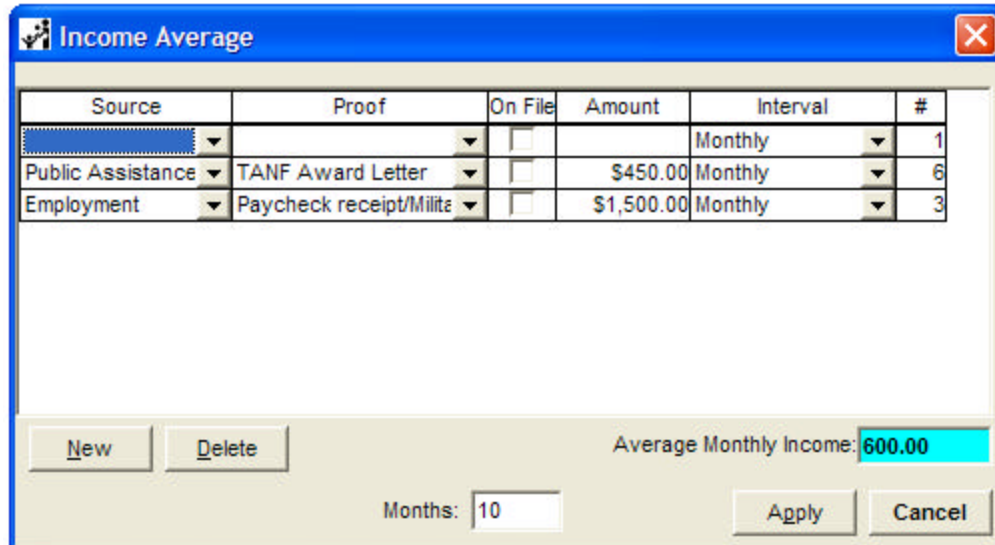


Click on [OK] to income average or use adjunct eligibility. Otherwise, click on [Cancel] and proceed with terminating the client if applicable.

### Income Averaging

To open the income averaging window

- Click on the [Inc Avg] button on the Income Documentation Tab, or
- Click on [OK] in the Income Ineligible window.

A Windows-style window titled "Income Average" with a red "X" icon in the top right corner. The title bar is blue. The main area has a light beige background. It contains a table with the following columns: Source, Proof, On File, Amount, Interval, and #. The table has three rows of data. Below the table, there are buttons for "New" and "Delete". At the bottom right, there is a label "Average Monthly Income:" followed by a text box containing "600.00". Below this, there is a label "Months:" followed by a text box containing "10". At the bottom right, there are buttons for "Apply" and "Cancel".

Source	Proof	On File	Amount	Interval	#
		<input type="checkbox"/>		Monthly	1
Public Assistance	TANF Award Letter	<input type="checkbox"/>	\$450.00	Monthly	6
Employment	Paycheck receipt/Milita	<input type="checkbox"/>	\$1,500.00	Monthly	3

1. Enter Source, Proof, On File, Amount, and Interval.
2. # is the number of intervals. For hourly, weekly and bi-weekly this is the number of hours, weeks, or bi-weeks the client received a payment. If a client received \$8.00/hour for 3 months, it is easier to hand calculate the monthly income (approximately \$1344/month for 3 months) than determine the total number of hours (approximately 504 hours).

3. There must be at least 12 months of information entered. You can see a running total of the months of data in the bottom Months field.
4. If there are more than 12 months of income data, the average monthly income will be the total of all income for all months divided by 12. This allows you to enter more than one income source for the same or overlapping time periods.
5. Use the [Add] and [Delete] buttons to add or delete rows of income information.
6. When you are finished, click on [Apply]. The computer returns to the Income Documentation Tab and automatically
  - Inserts the Average Monthly Income into the Amount column
  - Sets the Interval to Monthly
  - Uses the greatest total income source for the Source and Proof fields.
  - Displays the row of income information in *italics*.
7. Remember to enter the number in household. Then click the [Calculate Eligibility] button.

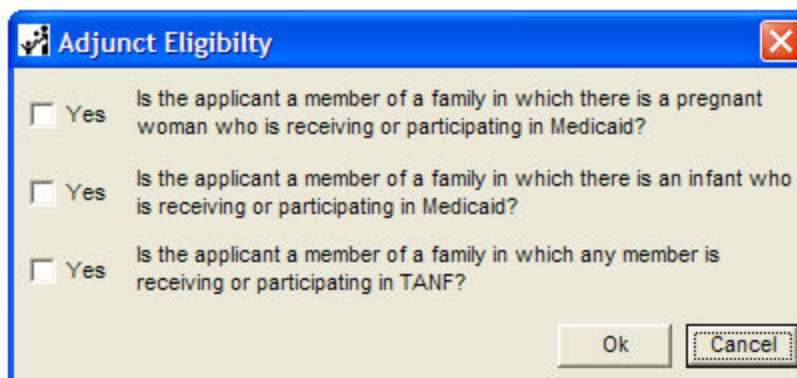
Income Averaging overwrites whatever income information (if any) was previously shown in the row. Make sure the correct row is highlighted before income averaging.

The row of income information will be *italicized* to indicate income averaging.

### Adjunct Eligibility

To open the adjunct eligibility window

- Click on the [Adj Elig] button on the Income Documentation Tab, or
- Click on [OK] in the Income Ineligible window.

A screenshot of a Windows-style dialog box titled "Adjunct Eligibility". The dialog has a blue title bar with a small icon on the left and a red "X" close button on the right. The main area is light gray and contains three questions, each with a "Yes" checkbox to its left. The questions are: "Is the applicant a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid?", "Is the applicant a member of a family in which there is an infant who is receiving or participating in Medicaid?", and "Is the applicant a member of a family in which any member is receiving or participating in TANF?". At the bottom right, there are two buttons: "Ok" and "Cancel". The "Cancel" button is highlighted with a dashed border.

To use adjunct eligibility, check the appropriate Yes box and click on [Ok]. The Adj Elig button becomes bold and italicized. Click on the [Calculate Income Eligibility].

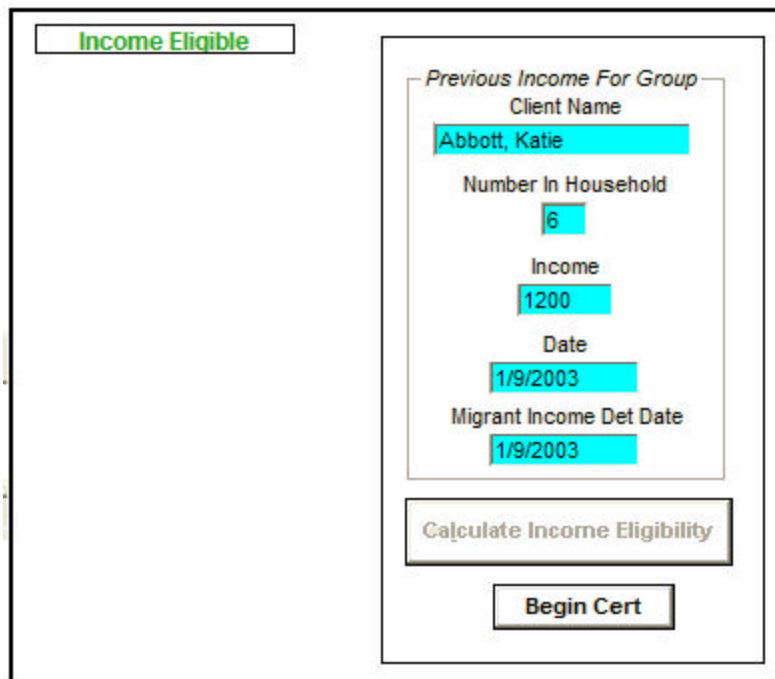
## Migrant Income Determination

Migrant income determination has been fixed to allow for yearly income determinations for the group. When Migrant is selected on the Demographics tab, the 'Migrant Income Det Date' fills in with the latest income determination date.

When another client is added to the group, the following message pops up:



Click [OK]. If the group is still migrant, [Calculate Income Eligibility] is disabled and the Income Eligible field displays.

A screenshot of a software form. On the left, there is a label "Income Eligible" in green text. On the right, there is a section titled "Previous Income For Group" with a sub-label "Client Name". Below this, there are several input fields: "Abbott, Katie" (highlighted in cyan), "Number In Household" with the value "6" (highlighted in cyan), "Income" with the value "1200" (highlighted in cyan), "Date" with the value "1/9/2003" (highlighted in cyan), and "Migrant Income Det Date" with the value "1/9/2003" (highlighted in cyan). At the bottom of this section are two buttons: "Calculate Income Eligibility" (disabled, greyed out) and "Begin Cert" (active, black text).

One year after the migrant income determination date, [Calculate Income Eligibility] becomes enabled and income eligibility must be determined.

## Pre-Screen Wizard

The Pre-screen wizard allows you to enter complete income information, partial income information, or by-pass the tab completely. You can quickly screen for income eligibility.

- Enter Number in Household and click the [Income Table] button; **or**,
- Enter Number in Household, Source, Amount, and Interval and then click the [Calculate Income Eligibility] button.

As before, it is not required to complete the income determination in the Pre-screen wizard

You can document any of the proofs of ID, residency or pregnancy at this time, or at the NC, PE, or EN wizards.

## New Certification Wizard

When you open a New Certification wizard, the Income Determination Tab displays data entered for the Pre-Screen wizard. You cannot edit data entered on a previous date.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
4/3/2003	3/31/2003	Employment		<input type="checkbox"/>	\$1,500.00	Monthly	\$1,500.00	

Buttons: [New] [Delete] [Income Table] [Inc Avg] [Adj Elig]

Total Monthly Income: 1500.00

If the income information is correct and all fields are complete, click the [Calculate Income Eligibility] button.

If there were one or more fields that were blank or need editing, click the [New] button and enter complete income information. All rows of aqua information become 'history' and are not included in the new monthly total.

You must enter data in all required fields before clicking the [Calculate Income Eligibility] button.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
4/3/2003	4/3/2003	Employment	Paycheck receipt/Milita	<input type="checkbox"/>	\$1,562.00	Monthly	\$1,562.00	
	3/31/2003	Employment		<input type="checkbox"/>	\$1,500.00	Monthly	\$1,500.00	

If income was by-passed during the Pre-Screen wizard, the aqua (history) line shows the date of the Pre-Screen and all other fields are blank.

Enter any of the proofs ID, residency, or pregnancy if needed.

## PE and EN Wizards

In a PE or EN wizard, the Income Determination Tab opens with a new blank line for income information. If complete income information was entered in a Pre-Screen wizard, delete the new blank line and calculate income eligibility. If you are adding more income to information entered at the Pre-Screen, the pre-screen data must be entered again. Use as many [New] lines as needed.

You can enter any additional information for proofs of ID, residency, or pregnancy as needed.

## CC Wizard

When completing a CC wizard, you do not have to re-assess income. If you need to update income information, open the Income Documentation tab. You'll see previous information is in aqua and cannot be edited. Also, the [New] and [Delete] buttons are not enabled. [Inc Avg] and [Adj Elig] can be viewed, but the information cannot be edited.

The screenshot shows the 'Income Documentation' tab in the CC Wizard. At the top, there are tabs for 'CC', 'Income Documentation', 'Measures', 'Assess Risk', 'Topics', 'Handouts', 'Referrals', 'Basic Contact', 'Notes', and 'Finish'. Below the tabs, there is a 'Number in Household' field set to 3, and checkboxes for 'Medicaid', 'TANF', 'Basic Food Program', and 'FDPIR'. An 'Edit Income' button is visible. The main table has columns: 'Cert Date', 'Assessed', 'Source', 'Proof', 'On File', 'Amount', 'Interval', 'Monthly', and 'Comments'. A single row is shown with '4/22/2003' in Cert Date, '3/27/2003' in Assessed, 'Employment' in Source, 'Grace Period' in Proof, a blank box in On File, '\$1,200.00' in Amount, 'Monthly' in Interval, and '\$1,200.00' in Monthly. Below the table, there are buttons for 'New', 'Delete', 'Income Table', 'Inc Avg', and 'Adj Elig'. The 'Total Monthly Income' is displayed as '1200.00' and the status is 'Income Eligible'.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
4/22/2003	3/27/2003	Employment	Grace Period		\$1,200.00	Monthly	\$1,200.00	

To make changes in income, click the [Edit Income] button. A new row of income information appears and all previous rows become 'history.'. You must complete all required fields. You can add extra rows of income information using the [New] button.

The screenshot shows the 'Income Documentation' tab in the CC Wizard. The 'Number in Household' is still 3. The table now has two rows. The first row is highlighted in aqua, indicating it is history: '4/22/2003' in Cert Date, '4/22/2003' in Assessed, 'Employment' in Source, 'Paycheck receipt/Militz' in Proof, a blank box in On File, '\$1,325.00' in Amount, 'Monthly' in Interval, and '\$1,325.00' in Monthly. The second row is the current entry: '3/27/2003' in Cert Date, '3/27/2003' in Assessed, 'Employment' in Source, 'Grace Period' in Proof, a blank box in On File, '\$1,200.00' in Amount, 'Monthly' in Interval, and '\$1,200.00' in Monthly. The 'Total Monthly Income' is now '1325.00'.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
4/22/2003	4/22/2003	Employment	Paycheck receipt/Militz		\$1,325.00	Monthly	\$1,325.00	
3/27/2003	3/27/2003	Employment	Grace Period		\$1,200.00	Monthly	\$1,200.00	

Remember to click the [Calculate Income Eligibility] button.

## Change Cert Info

You can re-assess a client's income at any time during a certification by using the Change Cert Info wizard. To change income information, open the Income Documentation tab.

1. To change income information on the same date that it was entered, simply make the change in the appropriate field and go to the Finish tab. Once the row of data turns aqua, you cannot change it.

Cert Date	Assessed	Source	Proof	On File	Amount	Interval	Monthly	Comments
3/27/2003	4/22/2003	Employment	Paycheck receipt/Mileage		\$1,500.00	Monthly	\$1,500.00	

Number in Household: 4 ☐ Medicaid ☐ TANF ☐ Basic Food Program ☐ FDIIR ☐ Migrant Worker

Total Monthly Income: 0 Previous Income For Group Client Name: Smith, Lorena

2. To change income information that has turned aqua, you must click the [Edit Income] button. A new blank row of income information appears.
3. All income information must be entered. You'll need to re-enter any income you want to keep.
4. Click the [Calculate Income Eligibility] button.
5. The Finish tab messages have been changed to include Income Eligibility requirements. If [Edit Income] was clicked, the wizard will not finish until the [Calculate Income Eligibility] button has been clicked and the client determined income eligible.

## Income History

Income history is readily accessible. At a RC previous certifications' income rows are displayed in aqua below the current income row. You cannot edit income from a previous certification period.

To view a previous income, click anywhere on the row having the Cert Date you are interested in. Information from that certification period is displayed.

Note: Income history is only shown for wizards completed in Version 4.0. Income determined in prior versions of Client Services must be viewed through Certification History and Report in the Client menu.

## New Nutrition Risk Factors

With this release you'll begin using the new nutrition risk factors based on Body Mass Index (BMI) and the revised CDC growth charts.

- Infants will no longer be eligible based on high weight/length.
- All measurement related risks are now based on the revised 2000 CDC growth grids.
- BF and PP women weight risks are now based on Body Mass Index (BMI) instead of Ideal Body Weights (IBW)

The new (and inactivated) risk factors are:

Category	Old Risk Factor	New and/or Inactive Risk Factors
I	Weight/Length = 90th	<i>Removed</i>
I	Weight/Length = 95th	<i>Removed</i>
C	Weight/Length = 90th	<i>Removed</i>
C	Weight/Length = 95th	Weight/Length = 95 <sup>th</sup> (24 – 36 mos) <i>Removed risk for Children 12 – 24 mos.</i>
C	Weight/Height = 5 <sup>th</sup>	BMI = 5 <sup>th</sup>
C	Weight/Height = 10 <sup>th</sup>	BMI = 10 <sup>th</sup>
C	Weight/Height = 90 <sup>th</sup>	BMI = 85 <sup>th</sup> and < 95 <sup>th</sup>
C	Weight/Height = 95 <sup>th</sup>	BMI = 95 <sup>th</sup>
PG	Underweight, Prepregnancy = 90% IBW	Pre-Pregnancy BMI < 19.8
PG	Overweight, Prepregnancy > 120% IBW	Pre-Pregnancy BMI ≥26.1
BF	Underweight, Current = 90% IBW	Current BMI < 18.5
BF	Overweight, Current > 120% IBW	Current BMI = 25 (= 6 mos postpartum)
BF		Pre-Pregnancy BMI < 18.5 (< 6 mos. postpartum)
BF		Pre-Pregnancy BMI = 25 (< 6 mos. Postpartum)
PP	Underweight, Current = 90% IBW	Current BMI < 18.5
PP	Overweight, Current > 120% IBW	<i>Removed</i>
PP		Pre-Pregnancy BMI < 18.5 (< 6 mos. Postpartum)
PP		Pre-Pregnancy BMI = 25 (< 6 mos. Postpartum)

Prenatal weight gain recommendations and grids remain the same, but are now based on the pregnant woman's pre-pregnancy BMI rather than Ideal Body Weight. The risks associated with low and high weight gain are also based on the woman's pre-pregnancy BMI.

The following risks will not appear to have changed in Client Services, however changes were made in the underlying data that was used to calculate the risk. The original risk from 3.9 was renamed and inactivated.

Category	Risk Factor	Based on:	Inactivated risk name
I	Head Circumference/Age <5th	CDC 2000	Head Circumference/Age <5 <sup>th</sup> , NCHS 1977
I, C	Slow Weight Gain	CDC 2000	Slow Weight Gain, NCHS 1977
I, C	Length/Age <=5th	CDC 2000	Length/Age <=5 <sup>th</sup> , NCHS 1977
I, C	Length/Age <=10th	CDC 2000	Length/Age <=10 <sup>th</sup> , NCHS 1977
I, C	Weight/Length <=5th	CDC 2000	Weight/Length <=5 <sup>th</sup> , NCHS 1977
I, C	Weight/Length <=10th	CDC 2000	Weight/Length <=10 <sup>th</sup> , NCHS 1977
C	Height/Age <=5th	CDC 2000	Height/Age <=5 <sup>th</sup> , NCHS 1977
C	Height/Age <=10th	CDC 2000	Height/Age <=10 <sup>th</sup> , NCHS 1977
PG	Low Weight Gain	BMI	Low Weight Gain (IBW)
BF, PP	High Weight Gain (This PG)	BMI	High Weight Gain (This PG) IBW

### Autocalculated Risks

Auto-calculation of growth nutrition risks based on the 2000 CDC graphs (including BMI) have been extensively tested against CDC data files.

Percentiles are calculated to the nearest hundredth (2 decimal places) before risks are determined. For example, a child whose percentile Height/Age is 05.01 will not be assigned the risk of Height/Age <=5<sup>th</sup>, but will instead be assigned the risk Height/Age <=10<sup>th</sup>. All percentile determinations were found to be accurate when compared to CDC calculations.

Improvements have been made to the visual display of the growth grids. Data points on the graph closely match the calculated percentile. Occasionally, a data point will slightly overlap a percentile line on the graph. This is due to the size of the data point displayed. If a risk does not autocalculate, the percentile (to 2 decimals) did not meet the risk criteria. The auto-calculated risk is correct, although there may be a slight variation in the plotted point displayed on the graph.

## Assess Risk Tab

There are no changes to the Assess Risk Tab other than the new and revised risk factors that now display.

## Graphs

Graphs were fixed to record up to 80 measurements. Previously, staff encountered problems if they entered more than 20 different measurements/dates.

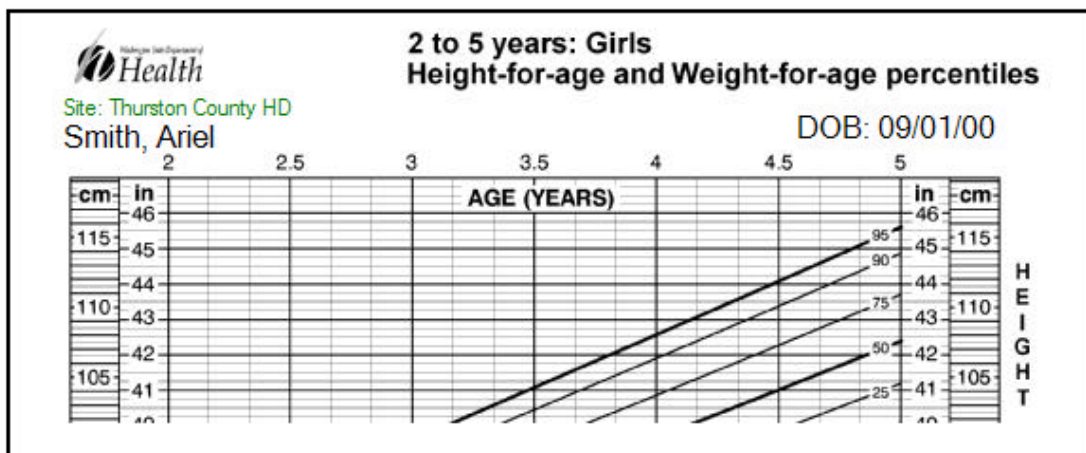
All infant and children graphs have been replaced with the Revised 2000 CDC graphs. Graphs available include:

### Infants:

- Length/Age (0 – 36 mos)
- Weight/Age (0 – 36 mos)
- Weight/Length
- Head Circumference/Age

### Children:

- Length/Age (0 – 36 mos)
- Weight/Age (0 – 36 mos)
- Weight/Length (0 – 36 mos)
- Head Circumference/Age (0 – 36 mos)
- Combined Ht/Age and Wt/Age (2 – 5 yrs)
- BMI/Age (2 – 20 yrs)



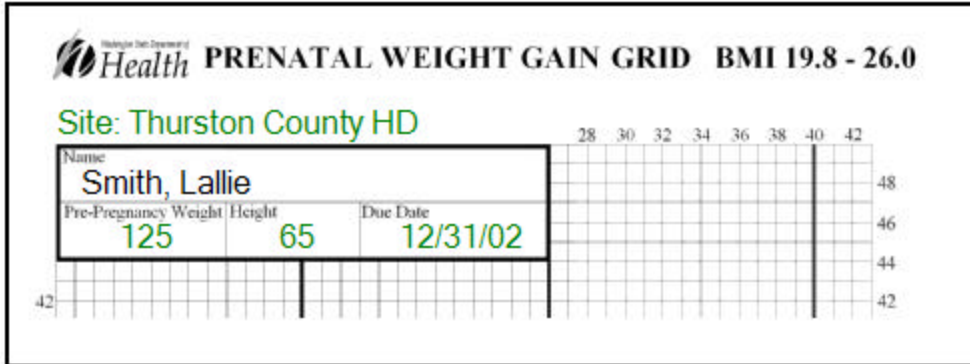
To make the children's graphs easier to read, the Ht/Age and Wt/Age grids were changed from 2 – 18 years to 2 – 5 years. These two grids display on a single combined graph.

Changes in the graphs include clearly displaying the name of the graph, the clinic site and the client's name and birth date at the top of the page. The date the graph is printed is in the lower right corner of the page.

## Prenatal Weight Gain Grids

Based on the following BMI weight categories, the appropriate weight gain grid will be used in CIMS

- Pre-Pregnancy BMI < 19.8 ----- Underweight grid
- Pre-Pregnancy BMI 19.8 – 26.0 ----- Standard grid
- Pre-pregnancy BMI > 26.0 ----- Overweight grid



Weight gain grids for pregnant women have been cleaned up. These graphs remain the same, however, the pre-pregnancy BMI determines which grid (under-, normal-, over – weight) is used. The terms “underweight” and “overweight” were removed from the grids to be more sensitive to clients. The weight for height table was also removed.

The name of the grid is displayed at the top of the page. For ease in sharing information with other health care providers, the client’s name, pre-pregnancy weight, height, and due date are clearly displayed. Your clinic’s name also appears at the top of the page.

Note: If your computer is a server/workstation, the client name and site name may overlap each other, when you view the graph on the computer. This has to do with the operating system on the servers. It will not affect the printed graph. Printed graphs will correctly display both the Site and Client names.

## Viewing Graphs on Screen

There are several new features for viewing the graphs on the computer screen. Like before, you can click on the grid, make an outline box, or press the [Zoom In] button to get a bigger view of the graph. You can also double click on the graph to have it fill more of your screen. Double click again, and you'll return to the standard graph page.

If you zoom in too far to see anything

- click on the [Reset] button, or
- click on the [Zoom Out] button, or
- right click to start zooming out,

Reset returns the graph to its original size.

## Registered Dietitian Wizard

**Subjective Tab.** There was a bug where occasionally a note for a Health Concern would not be saved. The problem occurred when incomplete careplans were completed. Information could be added to the notes field without first highlighting a specific concern in the mover box. When the RD wizard was saved, the computer couldn't assign the note to a concern, and the note was lost. Now, if you try to type in a note without first selecting a concern, the following message appears:



Click [OK] then select a Health Concern and type your note.

**Objective Tab.** Enhancements were made to the area that displays measurements to improve readability. Dates are easy to see and measurements are aligned. BMI information is displayed.

The field that displays either the hematocrit or hemoglobin is labeled Hct/Hgb if there is no data. The most recent hematological value entered on the Measures tab is displayed on this tab. If a hematocrit is recorded, the field is labeled Hct. If the data recorded is a hemoglobin, the field is labeled Hgb.

HRCP List	RD PG	S	Measures	<b>O</b>	A:Risk	A	P	I:Topics	I:Handouts	I:Referrals	E	Notes
Client		Smith, Lisette P			DOB		01/07/1980		Due Date		03/25/2003	
Caregiver		Smith, Lisette P			Age		23 Yrs		Category		PG	
Pre-Pregnancy Weight		115 lbs			Pre-Pregnancy BMI		19.4					
03/04/2003		Height		64 in	4	8ths		Normal BMI Range 18.5 - 24.9				
Weight		134 lbs		0	oz		@		37		wks. gestation	
11/12/2002		Hgb		11.1								
Meds												
<input checked="" type="checkbox"/> PN Vitamins <input type="checkbox"/> Iron      Other <input type="checkbox"/> Minerals												
Diet Assessment Done <input type="radio"/> No <input checked="" type="radio"/> Yes												

**Assessment Tab.** The same bug as in the “S” tab occurred here where a note for a Nutrition Concern would not be saved. The problem was notes could be added without first highlighting a specific concern. Now, you cannot add a note without first selecting the concern. An error message appears similar to the one shown in Subjective Tab above.

## Client Reports

**Certification Encounter and Certification History Reports.** The anthropometric and hematological data displayed in the Objective section of these reports are now presented in a shorter table format. Head circumference, if available, is displayed in a separate table below this.

<b>Objective:</b>									
Female					Breastfeeding: Stopped				
DOB: 07/16/2000					Date Stopped BF: 07/01/2001				
Age at Certification: 2 years 6 months									
Date of Measure	Length / Height	Height / Age Percentile	Weight	Wt / Age Percentile	Wt / Ln Percentile	BMI	BMI / Age Percentile	Hct %	Hgb g/dl
03/25/2003	H 36 4/8 in	50 - 75%	33 # 12 oz	75 - 90%		17.8	85 - 95%		
01/21/2003	H 36 1/8 in	50 - 75%	33 # 5 oz	75 - 90%		17.9	85 - 95%		

**HRCP Report.** The Measures section was combined into the Objective section. The table of anthropometric and hematological measurements for the certification period is the same as in Certification History Report. All measures and hematological values taken within the certification period are shown.

**Measurement History Report.** A column has been added to show the BMI, if applicable.

- Children must have a Height and Weight on the same date for the BMI to be calculated.
- A pre-pregnancy BMI is displayed for PG if both a height and a pre-pregnancy weight are recorded. The height used for calculating the BMI is shown.
- PG women have NA (not applicable) in the BMI column for measures, since a current BMI is not calculated during the pregnancy period.
- BF and PP display the height and weight along with the current BMI. If the height was taken at an earlier date, the height appears in *italics*.
- The order for the display of measurement data has changed. The most recent measures are at the top of the table and the oldest measures are at the bottom.

## Check Changes

### Children's Food Packages

Infant food packages automatically increment to C102 in the month the infant turns 12 months of age. To issue formula checks in the 12<sup>th</sup> month, issue monthly checks selecting the formula package from the drop-down menu of food package choices.

### Breastfeeding Food Packages

Once a B food package has been issued, staff cannot issue a B199 check. Similarly, if staff issue a B199, they cannot issue another B199 check or B series food package. The following error message displays:

Was issued a Bxxx package for April 2003  
A B series cannot be issued.

Where xxx is the package (B102, B199, etc) that was issued.

### Postpartum Food Packages

The food package automatically changes to P102 in the month after a woman turns 6 weeks postpartum.

### Other

Occasionally, staff know a retailer carries a specialty formula but get an error message when trying to print checks. The wording of the message was updated to correctly state the price of the food item is not in the CIMS system:

The price for *[name of food item]* for *[name of retailer]* is not in CIMS.  
If you know the retailer carries this product please contact the state office.

### Batch Checks

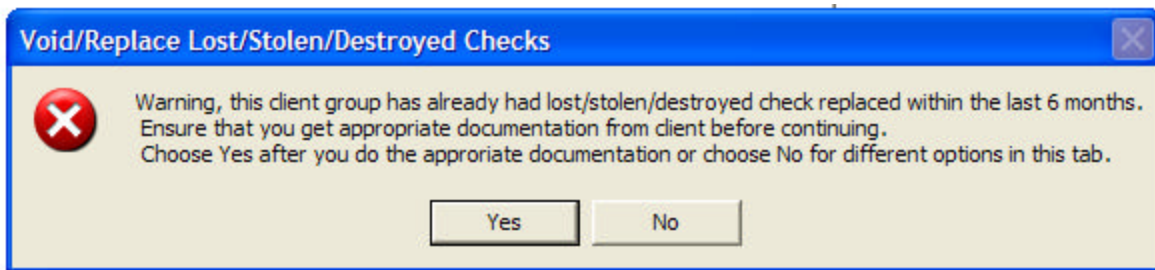
The Header and Trailer pages correctly print for Batch checks.

## Complaints Against Retailers

In Complaints Against Retailers, if Submitted by Other is selected, a note box appears and staff can enter notes.

## Void/Replace Wizard

The Void/Replace Wizard was modified to add a warning message if anyone in the group has reported lost/stolen/destroyed checks in the last 6 months. Replacing checks for several members of a group on the same day is considered 1 occurrence.



Click [Yes] to continue to the Checks List tab. Clicking [No] returns you to the Start tab where you can select other options or exit the wizard.

The Void/Replace wizard now allows you to replace valid checks for a child who has turned 5 years.

## Replace Non-CIMS Check Wizard

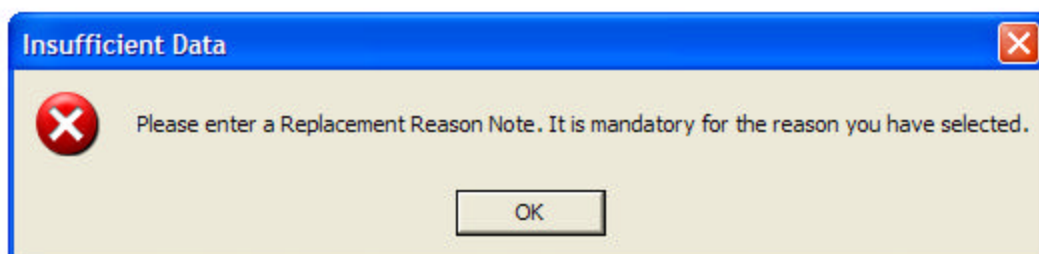
The Replace Checks tab was re-designed to include a reason for replacing non-CIMS checks.

The screenshot shows the 'Replace Checks' tab of a software application. It features several input fields and buttons. The 'Client' field is filled with 'Smith, Matthew M' and the 'Client ID' is '115010678'. The 'Caregiver' field is 'Smith, Lisette D' and the 'Age' is '0 Yr 3 Mo'. The 'First Day To Use' is '00/00/0000'. The 'Food Pkg' is 'I164ENF-4 cans powder Enfamil' and the '# Checks' is '1'. The 'Retailer' is 'Mega Foods-Primrose, 59 Holyol' and the 'Sequence #' is empty. The 'Replacement Reason' is a drop-down menu. There is a 'View' button and a 'Print' button. A 'Check Set' checkbox is present. A 'Replacement Reason Note' text area is at the bottom, with a blue italicized note that says '\*These reasons require a note'.

Select a Replacement Reason from the drop-down menu:

- Changed Formula\*
- Change Partial to Full Formula Package
- Formula Returned to Clinic\*
- Transfer In – In-state
- Transfer In – Out-of-state
- Other\*

Reasons with an asterisk (\*) require additional documentation in the Replacement Reason Note. If you forget to add a note, the following reminder pops up.



Click [OK] and enter a replacement note to continue.

# CLINIC REPORTS

## Introduction

All of the reports in this version of CIMS should look familiar. The names of some have been slightly changed to be more accurate. Reports are divided into 4 major groups:

- Clinic Reports
- Participation Reports
- Client Characteristics Reports
- Nutrition Risk Factors Reports

Within these groups, similar reports are grouped together, with lines of separation between the groups.

When a report is opened, a tool bar is displayed with the following icons:



Print



Generate



Clear



Exit

To print a report, click the print icon or go to File, Print. You can use either the buttons or icons to generate reports and clear report settings. You close the Clinic Reports application the same way you would close Client Services, either using the Exit icon, the “X” in the upper right corner of the window, or going to File, Exit.

## Clinic Reports

Clinic Reports
Appointment Summary
Client Summary
Daily Client Activity
Interpreter
No Activity
Daily Check Reconciliation
Outstanding Handwritten Checks
Clinic Directory Abbreviated
Clinic Directory Detailed
Retailer Listing
Survey Results
Transfer Card
Transfer Out

The order of Clinic Reports has changed.

The Client Summary is now more manageable. It was changed to only include clients whose eligibility ended in the preceding 3 months.

The Check Reconciliation report is now called the Daily Check Reconciliation report.

## Participation Reports

<u>Participation Reports</u>
Caseload Management
Participation By Age Participation By Priority
County/City Residence Clinic Actions Termination Reasons
Ethnicity/Race Expanded Categories Ethnicity/Race - Federal Categories

The order of Participation Reports has changed.

The County/City Residence report has been moved here. (It used to be listed under Clinic Reports.)


The Participation by Priority report has now been fixed. Postpartum women are no longer counted in the Priority 1 column.

Participation reports can only be run for a single month at a time.

The data for the Caseload Management, Participation By Age, and Participation By Priority reports is scheduled to “be updated” each night. When these reports are generated, there is a box displaying the Last Updated date. If the date is not current, please call the Help Desk.

Report Month	12/2002	Last Updated: 12/13/2002	Generate
Service Site	ThurstonCHD-Olympia WIC Clinic		
Report Type	Monthly	Clear	

	<p>WIC Program <b>Caseload Management Report</b> Service Site - ThurstonCHD-Olympia WIC Clinic Report Period: December 01, 2002 through December 31, 2002 using all data available on 12/13/2002</p>
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## Client Characteristic Reports

<u>Client Characteristics Reports</u>
Income as % of Poverty Income Source Migrant/Homeless/High Risk Month of Pregnancy on Entry to WA WIC Reported Use of Other Services Interpreter Needs

The original report is now six separate reports. Each report is run separately.

New income sources have been added to Income Source report.

## Nutrition Risk Factor Reports

<u>Nutrition Risk Factor Reports</u>
Pregnant Breastfeeding Postpartum
Infant Children

This report is now run separately for each Category.

Both current and inactive risk factors are displayed on the report. A column was added to show the inactivation date for nutrition risk factors.

## OTHER

The portable Express printers are being replaced. A small change was made to check printing so the new printers will work.

Gender is now a required field. If you forget to enter a client's gender, at the Finish tab, you'll get the following message:



When you click [OK], you are returned to the Demographics tab with the cursor in the Gender field.

## Help

The Help item on the menu bar has been turned off. If you click on Help, you will get a message to call the Help Desk.